USDA Weekly Retail Turkey Feature Activity

Fri. Feb 08, 2013

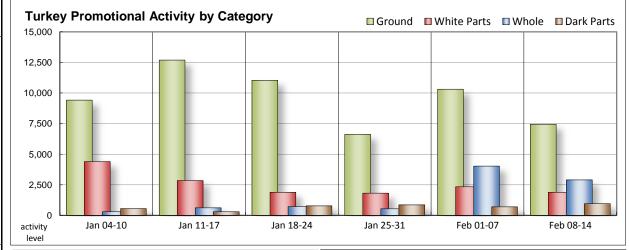
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 02/08 thru 02/14.

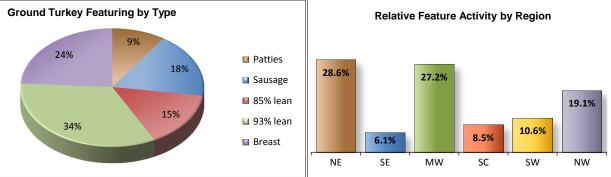
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY											
		WEEK	i	WEEK	LAST YEAR						
Feature Rate 1/		of 23,200 tlets	40.1% (of 23,200 tlets	31.2% of 22,500 outlets 7.4%						
Special Rate 4/	3.	9%	0.	3%							
Activity Index 2/	14	,270		,710	8,810						
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg					
WHOLE BIRDS:											
Fresh - Hens											
" - Toms											
Frozen - Hens	1,450	0.92	2,070	1.06	130	1.44					
" - Toms	1,450	0.92	1,960	1.05	120	1.51					
PARTS:											
Breast:											
Bone-in, whole											
Fresh	110	2.51			80	2.43					
Frozen	550	1.77	1,710	2.08	930	1.78					
Split, bone-in											
Fresh	50	2.99	250	3.99	10	2.29					
Rotisserie	540	8.34	50	7.01	320	6.90					
Boneless, whole	10	4.99	20	4.49	10	5.99					
Cutlets	400	5.05	90	4.76	290	4.56					
Cutlets, thin sliced			150	4.99	100	4.99					
Strips											
Tenders	230	4.35	70	3.29	210	4.59					
Marinated Tenders	150	4.55	570	4.24	1,120	3.82					
Drumsticks	270	1.67	230	2.01	310	1.44					
Thighs	20	2.09	190	2.14	10	1.59					
Wings	260	1.68	200	2.09	90	1.51					
Necks	230	1.69									
Smoked Drumsticks	80	1.89	50	2.07	30	1.99					
Smoked Wings	80	1.89	30	2.60	10	2.38					
Smoked Necks	20	1.59			30	1.76					
GROUND TURKEY:	7,450	3.45	10,310	3.24	3,140	3.44					
Patties	710	3.30	510	3.68	460	3.30					
Sausage	1,330	3.35	2,090	3.61	440	3.52					
85% lean	1,120	2.62	1,770	2.58	590	2.36					
93% lean	2,500	3.26	5,480	3.16	1,110	3.49					
Breast	1,790		460	4.30	540	4.78					
Rolls (frsh/frz 1 lb.)	500	1.47	280	2.26	1,210	1.27					
Specialty 5/											
Patties	40	3.99	520	3.99	130	4.00					
93-94% lean	340	3.65	960	4.27	240	4.66					
Breast	40	6.62			290	5.49					
Note: rolls & specialty no	ot included	l in ground	turkey tota	al and weigl	nted avera	age.					

This Week's Turkey Feature Highlights

Promotional activity slows on turkey items, increases on deli items. Fewer stores are offering frozen hens and toms compared to last week but offerings are still plentiful and much more active than the same week a year ago. There are some very attractive prices; this would be a good time to pick up a whole turkey for later use. Offerings increase on fresh bone-in breasts, decline on frozen bone-in breasts. Rotisserie breasts can be found in more circulars this week but they will cost more. Boneless white parts offerings are most active on cutlets; prices are higher on all of the boneless white parts. Dark parts are fully represented; featuring is more active and prices are lower, a good combination for consumers. Offerings decline on ground turkey; the weighted average price is higher. Stores increase promotions for ground breast but the 93% lean continues to be the most actively promoted grind. Service deli featuring increases on processor brands; prices are mostly higher on processor brands, mixed on private brands. Self-service deli market activity increases on private brands; stores are giving chicken a large share of the ad space week.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



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(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	NORTH	HEAST U.S.		SOUT	HEAST U.S.		MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI) 47.6% of 4,200 sampled outlets 4.7% of stores w/ no-price promotions			
	(CT,DE,MA,MD,M	E,NH,NJ,NY,PA,F	RI,VT)	(AL,FL,GA,M	S,NC,SC,TN,VA,V	VV)				
Feature Rate 1/	61.5% of 4,60	0 sampled outlet	ts	20.6% of 6,1	00 sampled outle	ets				
Special Rate 4/	2.4% of stores w	/ no-price promo	tions	7.9% of stores	w/ no-price prom	otions				
Activity Index 2/	Activity	Index = 5,010		Activity	/ Index = 1,450		Activity Index = 4,330			
	Price Range	Summary		Price Range	Summa	ry	Price Range	Summar	Т у	
	(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores	Wtd Avg	(\$/pound)	Stores V	Vtd Avg	
WHOLE BIRDS:										
Fresh - Hens										
" - Toms										
Frozen - Hens	1.29	140	1.29	0.79 - 1.19	190	0.97	0.77 - 0.99	800	0.90	
" - Toms	1.29	140	1.29	0.79 - 1.19	190	0.97	0.77 - 1.19	800	0.91	
PARTS:										
Breast:										
Bone-in, whole										
Fresh	2.69	10	2.69				2.49	100	2.49	
Frozen	1.39 - 1.99	280	1.80	1.38 - 1.99	100	1.72	1.49 - 1.99	80	1.76	
Split, bone-in										
Fresh	2.99	50	2.99							
Rotisserie	6.89 - 9.99	360	8.58							
Boneless, whole	4.99	10	4.99							
Cutlets	4.99 - 5.99	370	5.07				5.46	10	5.46	
Cutlets, thin sliced										
Strips										
Tenders							4.79 - 6.98	30	6.41	
Marinated Tenders	4.26	40	4.26	4.66	110	4.66				
Drumsticks	1.99	10	1.99	1.69	50	1.69	1.39 - 1.69	200	1.67	
Thighs	2.29	10	2.29				1.89	10	1.89	
Wings	1.68	10	1.68	1.69	50	1.69	1.39 - 1.69	200	1.67	
Necks				1.69	50	1.69	1.69	180	1.69	
Smoked Drumsticks	1.99	60	1.99	1.59	20	1.59				
Smoked Wings	1.99	60	1.99	1.59	20	1.59				
Smoked Necks				1.59	20	1.59				
GROUND TURKEY:										
Patties	2.49 - 3.79	120	2.88	2.99 - 3.49	70	3.44	2.99 - 3.50	440	3.36	
Sausage	3.19 - 4.29	720	3.66	3.49	60	3.49	2.86 - 3.49	310	2.90	
85% lean	2.16 - 3.45	300	2.81	2.29 - 2.99	130	2.59	2.00 - 3.00	240	2.37	
93% lean	2.92 - 5.49	1,000	3.66	2.99 - 3.45	280	3.28	2.49 - 3.20	530	2.82	
Breast (99-100% lean)	3.76 - 5.38	770	4.63	4.49 - 4.61	110	4.56	3.33 - 4.98	210	3.52	
Rolls (frsh/frz 1 lb.)	-	170					1.59 - 2.50	180	2.00	
Specialty ^{5/}										
Patties	3.99	40	3.99							
93-94% lean	2.99 - 4.99	310	3.57				3.99	10	3.99	
Breast	6.99	30	6.99	\ \(\(\frac{1}{2} \) \(\fra						





(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	SOUTH (CENTRAL U.S.		SOUT	HWEST U.S.		NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)			
	(AR,AZ,CO,KS,I	LA,MO,NM,OK,TX	(,UT)	(0	CA,HI,NV)					
Feature Rate 1/	16.7% of 4,20	00 sampled outle	ets	33.0% of 2,9	00 sampled outle	ets	40.1% of 1,20	0 sampled outle	ets	
Special Rate 4/	1.2% of stores w	// no-price promo	otions		v/ no-price prom		5.4% of stores w/ no-price promotions			
Activity Index 2/		Index = 1,350			Index = 1,220		Activity Index = 910			
riourny index	Price Range	Summa	rv	Price Range	Summa	rv	Price Range Summary			
	(\$/pound)		Vtd Avg	(\$/pound)		Wtd Avg	(\$/pound)		Wtd Avg	
WHOLE BIRDS:										
Fresh - Hens										
" - Toms										
Frozen - Hens	0.59 - 1.19	320	0.77							
" - Toms	0.59 - 1.19	320	0.77							
PARTS:										
Breast:										
Bone-in, whole										
Fresh										
Frozen	1.49 - 1.99	80	1.71				1.99	10	1.99	
Split, bone-in										
Fresh										
Rotisserie	7.49	50	7.49	7.99	130	7.99				
Boneless, whole										
Cutlets	4.49	20	4.49							
	4.49	20	4.49							
Cutlets, thin sliced										
Strips										
Tenders	4.49	20	4.49	3.99	180	3.99				
Marinated Tenders										
Drumsticks	1.29	10	1.29							
Thighs										
Wings										
Necks										
Smoked Drumsticks										
Smoked Wings										
Smoked Necks										
GROUND TURKEY:										
Patties	3.49	20	3.49	3.50 - 3.99	50	3.63	2.50	10	2.50	
Sausage				3.27	10	3.27	2.50 - 3.68	230	2.93	
85% lean	2.50 - 3.00	240	2.55				1.99 - 2.80	210	2.76	
93% lean	2.49	10	2.49	2.80 - 3.99	400	3.02	2.80 - 3.99	280	3.05	
Breast (99-100% lean)	3.33 - 4.99	110	4.02	3.99 - 4.99	440	4.10	3.99 - 4.79	150	4.06	
Rolls (frsh/frz 1 lb.)	2.49	140	2.49	2.50	10	2.50				
Specialty ^{5/}										
Patties										
93-94% lean	4.99	10	4.99				4.49	10	4.49	
Breast							5.49	10	5.49	



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Feb 08, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 02/08 thru 02/14.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	RY			NORTHEAST U.S.		SOUTHEAST U.S.					
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)		(AL,FL,GA,MS,NC,SC,TN,VA,WV)					
Feature Rate 1/	79.8% o	f 23,200	70.1 % o	f 23,200	70.6% o	f 22,500								
Feature Rate	sto	res	sto	res	sto	res	90.1% of 4,600 sampled outlets			81.3% of 6,100	81.3% of 6,100 sampled outlets			
Activity Index 2/	52	280	44	620	/11	760	Activity Ind	ex = 15,350		Activity Ind	lex = 11,960			
Activity index 2/	32,	200	44,	020	41,	700	Price Range	Sumr	mary	Price Range	Summary			
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg		
SERVICE DELI - Turkey														
Category 1														
Processor Brand	5,880	8.38	-	8.12	5,430	7.63	5.99 - 9.99	3,130	8.49	6.99 - 9.99	710	8.90		
Private Brand	2,130	7.60	1,730	7.85	2,810	8.05	6.99 - 7.99	1,990	7.58	7.99	70	7.99		
Category 2														
Processor Brand	5,420	6.00	,	5.59	4,890	5.97	4.98 - 6.99	1,490	6.34	4.59 - 6.99	600	5.78		
Private Brand	3,530	7.02	3,630	7.02	3,970	6.96	4.98 - 7.99	280	6.17	6.99 - 7.99	1,080	7.03		
Category 3												,		
Processor Brand	1,090	3.87	770	3.62	960	3.99	2.98 - 4.99	140	3.85	2.98 - 5.99	300	4.23		
Private Brand	50	5.18	180	4.90			5.48	40	5.48					
Turkey Ham	0.40	4.05	000	0.50		0.00	0.00 5.40	400	5.40	5.40	00	5 40		
Processor Brand	240	4.85		3.56	590	3.38	3.99 - 5.49	190	5.10	5.49	20	5.49		
Private Brand			60	3.98										
Turkey Pastrami	700	4.00	000	0.40	000	= 0.4	4.00 5.40	0.40	5.40	0.00 5.40	450	4.40		
Processor Brand	730	4.33	330	3.48	380	5.21	4.99 - 5.49	240	5.13	3.99 - 5.49	150	4.19		
Private Brand														
SERVICE DELI - Chicken														
Category 1														
Processor Brand	3,220	7.65	-,	7.24	3,940	7.55	5.99 - 9.99	1,810	7.92	5.39 - 8.99	370	7.86		
Private Brand	900	7.12	1,440	7.12	1,350	6.91	6.99 - 7.99	810	7.07					
Category 2	240	F 07	470	F 00	500	0.05								
Processor Brand	310	5.67	170	5.69	520	6.35								
Private Brand SELF-SERVICE DELI	240	5.45	70	5.99	190	6.37								
(dollars per tub or pouch)														
Turkey 7-10 oz														
Processor Brand	9,270	2.99	10,620	3.11	7,270	2.99	2.50 - 4.00	1,610	3.24	2.50 - 3.99	3,400	2.96		
Private Brand	4,180	2.65		3.11	1,600	3.08	2.33 - 3.99	930	2.91	2.33 - 3.00	650	2.59		
Turkey 16 oz	1,100	2.00	1,120	0.11	1,000	0.00	2.00 0.00	300	2.01	2.00 0.00	000	2.00		
Processor Brand	1,810	4.40	480	4.58	520	6.39	3.98 - 5.49	240	4.18	3.99 - 5.99	560	4.22		
Private Brand	.,	10	120	6.29	3_0	2.30	0.00	_ 10		0.00				
Chicken 7-10 oz														
Processor Brand	9,100	3.00	8,870	2.97	5,740	3.03	2.50 - 4.00	1,520	3.27	2.50 - 3.99	3,400	2.96		
Private Brand	4,180	2.65	930	3.03	1,600	3.08	2.33 - 3.99	930	2.91	2.33 - 3.00	650	2.59		

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)





USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 02/08 thru 02/14.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	MIDW	EST U.S.	SOUTH C	ENTRAL U.S.	SOUTHV	VEST U.S.	NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
	(IA,IL,IN,KY,MI,M	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX,UT)	(CA,I	HI,NV)			
Feature Rate 1/					42				
		0 sampled outlets	· ·	0 sampled outlets	· ·	sampled outlets	*	sampled outlets	
Activity Index 2/	Price Range	ndex = 11,840 Summary	Price Range	ndex = 6,310 Summary	Price Range	dex = 4,230 Summary	Activity Index = 2,590		
	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	Price Range (\$/pound)	Summary Stores Wtd Avg	
SERVICE DELI - Turkey	(ψ/ροατία)	Stores With Avg	(φ/ροαπα)	Stores With Avg	(φ/ροαπα)	Stores With Avg	(ψ/ροαπα)	Stores Wid Avg	
Category 1									
Processor Brand	5.99 - 11.99	1,100 7.84	6.98 - 9.69	620 8.20	7.29	10 7.29	7.49 - 9.99	310 8.40	
Private Brand	6.99	20 6.99	7.99 - 8.49	50 8.24	7.29	10 7.29	7.49 - 9.99	310 0.40	
Category 2	0.55	20 0.55	7.55 - 0.45	30 0.24					
Processor Brand	4.29 - 6.99	2,050 5.83	4.98 - 6.49	650 5.99	5.99	580 5.99	5.00 - 6.99	50 6.15	
Private Brand	4.48 - 7.99	820 5.99	6.99 - 7.99	470 7.49	7.99	550 7.99	7.99	330 7.99	
Category 3									
Processor Brand	2.49 - 4.99	520 3.60	3.49 - 4.99	120 4.26			2.99	10 2.99	
Private Brand	3.98	10 3.98							
Turkey Ham									
Processor Brand			2.49 - 2.99	20 2.70	2.99	10 2.99			
Private Brand									
Turkey Pastrami									
Processor Brand	3.49 - 4.49	310 3.82	3.98	30 3.98					
Private Brand									
SERVICE DELI - Chicken									
Category 1									
Processor Brand	5.99 - 7.99	510 7.03	5.99 - 8.49	420 7.28	5.99 - 8.99	110 6.71			
Private Brand	7.99 - 9.99	40 8.43	6.99	50 6.99					
Category 2									
Processor Brand	3.50 - 4.98	60 4.33			5.99	250 5.99			
Private Brand	4.99 - 5.98	240 5.45							
SELF-SERVICE DELI									
(dollars per tub or pouch)									
Turkey 7-10 oz									
Processor Brand	1.98 - 3.99	1,630 2.82	1.79 - 2.69	1,010 2.98	1.99 - 2.99	870 2.95	2.50 - 3.49	750 3.06	
Private Brand	2.33 - 2.99	1,190 2.52	2.33 - 3.00	840 2.67	2.33 - 2.99	480 2.60	2.33 - 2.79	90 2.41	
Turkey 16 oz	0.00 4.00	500 44:	2.22	400 000	2.22	00 000	0.00	040 05	
Processor Brand	3.99 - 4.99	590 4.11	3.99	190 3.99	3.99	20 3.99	3.99 - 6.49	210 6.37	
Private Brand									
Chicken 7-10 oz Processor Brand	1.98 - 3.99	1,560 2.83	2.19 - 2.99	1,000 2.99	1.99 - 2.99	870 2.95	2.50 - 3.49	750 3.06	
Processor Brand Private Brand	1.98 - 3.99 2.33 - 2.99	1,560 2.83 1,190 2.52	2.19 - 2.99	1,000 2.99 840 2.67	1.99 - 2.99 2.33 - 2.99	480 2.60	2.50 - 3.49	90 2.41	
Private Brand	2.33 - 2.99	1,190 2.52	2.33 - 3.00	040 2.07	2.33 - 2.99	400 2.00	2.33 - 2.19	90 2.41	

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)